Chapter 7 - Reports

January 1, 2003

Statistical and Informational reports are designed to give you a variety of information about your database in several different formats. This is also where you can generate public lists.
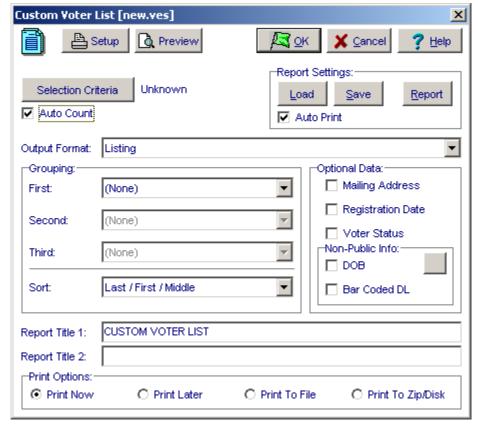
Challenged or Canceled Voters Report

This report is designed to give you a list of voters who have been Challenged or Canceled on or after a specified date. This report includes the voter's name, address, ID number, date of birth, date of the status change and the reason for the status change.

Action	Result
From *Reports* in the menu bar, go to *Statistical and Informational*, and click on *Challenged or Canceled Voters*.	The *Report for Challenged or Canceled Voters* screen is displayed.
Ensure the County and Jurisdiction are correct. In the What to Print box choose either Challenged Report or Cancellation Report.	Your list will contain either voters with the "Challenged" status or with the "Canceled" status.
Enter a date in the Status Changed On or After (Date): field.	Your list will contain the names of voters whose status changed on or after the date entered. If no date is entered, the list will contain everyone in the database with the specified status.
Choose Print Now, Print Later, or Print to File and click on the **[OK]** button.	The report will either start printing immediately or will be sent to the *Local Report Queue* and you are returned to the *QVF Main Desktop*.

Custom Voter Lists

The *Custom Voter List* screen allows you to access a wide variety of information. Public lists created in the *Custom Voter List* screen will automatically contain the following information: Name, Precinct, Residential Address, Permanent AV, Voted/AV, Year of Birth and Gender. Options exist for including additional information. However, it should be noted that "Non-Public" information should not be given to the public. You are also able to generate mass ID cards and Master cards from this screen. Mailing labels can be generated in either a large (1.33 x 4 in.) or a small (1 x 2 5/8 in.) format.

Action	Result
Under *Reports* in the menu bar go to *Statistical and Informational*, then select *Custom Voter List* from the sub-menu.	The *Custom Voter List* screen appears.
Click on the **[Selection Criteria]** button.	The *Custom Voter List Selection Criteria* screen appears.
Tabs in the *Custom Voter List Selection Criteria* screen allow you to choose multiple sort options Click on a tab.	A list of pertinent criteria appears.
Place a check mark in the field Select Specific Items to Include.	The items in the grid become enabled.

Highlight the items you want applied to your list. You can highlight more than one item by holding down the **Control** key and clicking on random items. You can also highlight consecutive items by holding down the **Shift** key and using the **Up** and **Down Arrows** on the keyboard	Sorting criteria are established.
Click on other tabs, place check marks in the Select Specific Items To Include box and highlight other items.	Your selection criteria are expanded.
Toward the bottom of the screen there are two Registered Between fields. The default dates are meant to include everyone in the database. If you want a list of only those who have registered in a certain time frame, enter those dates in the Registered Between fields.	Your list will only include voters registered between those dates.
At the bottom of the screen are Status check boxes. Active, Challenged and To Be Verified default as being checked. These are the status' of voters that will appear on you precinct lists. You can expand or contract you list by placing or removing check marks from the appropriate boxes. You can also create a list of voters on your permanent AV list by checking the box Perm AV's Only in addition to Active, Challenged and To Be Verified.	Tabs with selection criteria appear or disappear depending on what status check boxes are marked. Only those voters with the status' checked will appear on your report.
When you have finalized your selection criteria click on the **[OK]** button.	There will be a wait of up to several minutes as your list is sorted. The length of time will depend on the size of your jurisdiction and the number of factors you have entered for your sort options. Finally you will be returned to the *Custom Voter List* screen. A number will be displayed next to the **[Selection Criteria]** button. This is the number of voters on your list.
In the Output Format field, from the drop down list, choose the form in which you want your list. You have your choice of Listing, Mailing Labels, Household Labels, ID Cards, Master Cards, and several Number of Registered Voters reports.	Your report format is established.

The Grouping fields allow you to gather common record traits in one place. You can employ up to three Groupings, using criteria such as the various Districts, Jurisdictions or Precincts.	The criteria which will be used to group voters in your report are established.
The Sort field determines in what order the names will print. You can print alphabetically by name, by address, by registration date, by status, or by zip code.	The order in which the names will print is established.
On the right side of the screen are Optional Data check boxes with which you can tailor the information that will appear on your report: this includes both public and non-public information. You can choose to include Optional Data (Mailing Address, Registration Date, Voter Status), and Non- Public Information (Date of Birth and Bar Code Coded DL) in your report.	The information that will appear on your report is established.
Report Title 1 and Report Title 2 allow you to enter a title and a sub-title for your report. Custom Voter List defaults into the Report Title 1 field. If you want to enter your own report title, delete Custom Voter List from the Report Title 1 field and enter your own title. If you want to include a sub-title, enter it in the Report Title 2 field.	The title and sub-title will print at the top of each page your the report.
Place a check mark in the Auto Print check box if you want a separate page to print at the end of your report which will list the selection criteria and the report options you chose for your report.	The Custom Voter List Settings report will print at the end of your list.
At the bottom of the screen is a radio button in Print Options that will establish how your report will print. Choose from among Print Now, Print Later, Print to File, or Print to Zip/Disk. (Using the Zip/Disk function will be addressed in a separate section below.)	How and when your report will print is established.
Click on the **[OK]** button.	Your report will either start printing immediately or will go to the *Local Report Queue.* You are then returned to the *QVF Main Desktop.*

Saving a Custom Voter List Sort You May Want to Use Again

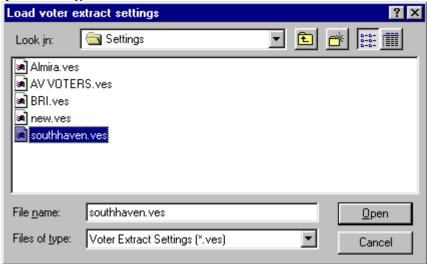Custom Voter List sort settings may be saved for later retrieval and use.

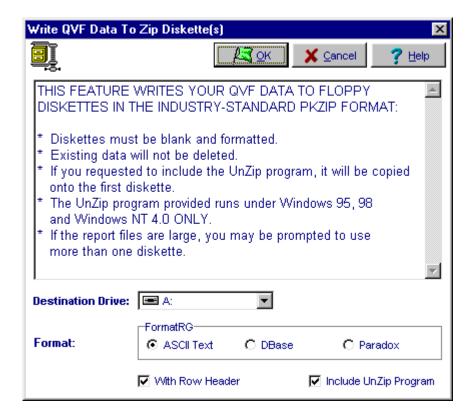| Action	Result
When you initially build a report, you first go from the *Custom Voter List* screen to the *Custom Voter List Selection Criteria* screen.	
After you have chosen all of your selection criteria you will be returned to the *Custom Voter List screen.*	A number will be displayed next to the **[Selection Criteria]** button. This is the number of voters in your list.
In the upper right of the *Custom Voter List* screen there is a box labeled Report Settings. The **[Load]** button allows you to access a report setting that you had save previously. The **[Save]** button will allow you to save the report settings you just created. The **[Report]** button will allow you to print what report settings are included in a particular saved report format. Click on the **[Save]** button.	The *Save voter extract settings* screen appears. A Settings folder should appear in the Save in field. A list of previously saved settings will appear in the center of the screen.
Toward the bottom of the screen, in the File name field, enter the name that you want to assign to this collection of report settings. Then click on the **[Save]** button.	Your report settings are saved and the *Save Custom Voter List settings* screen disappears.

Using Saved Report Settings

Once you have saved your report settings you can use them at any time to automatically generate a new report.

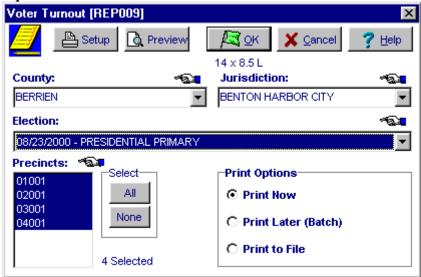| Action	Result
In the upper right part of the *Custom Voter List* screen click on the **[Load]** button.	The *Load voter extract settings* screen appears.
From the list of saved report settings in the middle of the screen click on the report settings you want to employ.	The name of the chosen report settings is highlighted.
Click on the **[Open]** button.	The report settings are applied to your database and you are returned to the *Custom Voter List* screen. The number of voters who will appear on your list will be displayed next to the **[Selection Criteria]** button.
At the bottom of the screen, in the Print Options area, choose to Print Now, Print Later, Print to File, or Print to Zip/Disk.	
Click on the **[OK]** button.	The report will either start printing immediately or be sent to the *Local Report Queue* and you are returned to the *QVF Main Desktop.*

Printing to a Zip/Disk

Custom Voter Lists contain more information than the old Public Lists, so only about 6,000 names will fit on a disk. The Print to Zip/Disk feature will automatically compress a report, allowing you to put about 24,000 records on a floppy disk. For larger jurisdictions some reports will not fit on a single compressed disk. In these cases, the system will prompt you when a second disk is needed.

Action	Result
In the ***Custom Voter List*** screen, after you have sorted your report, under Print Options choose Print to Zip/Disk. Click on the **[OK]** button.	The ***Write QVF Data to Zip Diskette(s)*** screen appears.
The grid in the center of the ***Write QVF Data to Zip Diskette(s)*** screen contains general information on using the compression feature.	
At the bottom of the screen, the Destination Drive field allows you to specify what drive you want the report information sent to. The A drive will default in this field, this is what you will use in most cases.	The destination for your report is set.

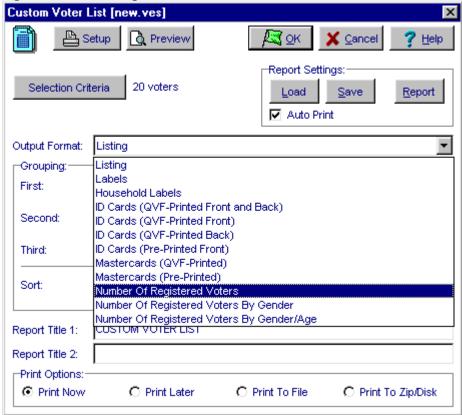|	
In the lower right corner of the screen is a check box for Include UnZip Program. Putting a check mark here will allow people whose computers do not have a zip program to unzip the file. If the person receiving the disk has an unzip program, such as PKZip or WinZip, they do not need this.	Whether or not the unzip program will be included is determined.
Click on the **[OK]** button.	An information screen appears, "Please insert a blank formatted floppy in drive A."
Ensure that you have a formatted floppy disk in your A drive. Then click on the **[OK]** button.	The information screen disappears. The report is copied to the disk. When the copying is complete, the *Custom Voter List* screen disappears.
	If your report is big enough to require more than one disk, when the first disk is full, the message screen appears, "Please insert disk #2 of the set."
Insert your second disk and click on the **[OK]** button.	The message screen disappears and the report continues copying to the second disk. When the copying is compete, the *Custom Voter List* screen will disappear.

Voter Turnout Report

The *Voter Turnout Report* is designed to give you a statistical break down of the number of voters who participated in a particular election by precinct, gender and age. The report may be run once *Voting History* has been updated. The information for this report is stored on the server in Lansing, but is not continuously updated. You must update voting history within forty days of the election for it to be reflected on the *Voter Turnout Report*.

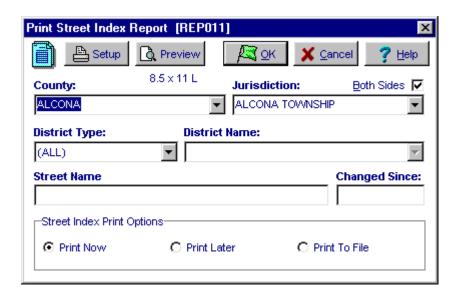| Action	Result
From *Reports* in the menu bar go to *Statistical and Informational*, then click on *Voter Turnout*.	The *Voter Turnout* screen is displayed.
Ensure that the County and Jurisdiction are correct, then choose from the drop down list the Election for which you want the report.	Depending on the election chosen, jurisdiction, school district or village precincts will appear in the Precincts box.
In the Select box, you can use the **[All]** or **[None]** buttons to highlight or remove highlights from the precincts in the Precincts box. You can also highlight single or multiple precincts by clicking on them.	
Choose Print Now or Print Later and click on the **[OK**] button.	The report will either start to print immediately or will be sent to the *Local Report Queue* and you are returned to the *QVF Main Desktop*.

Number of Registered Voters Report

There are three versions of the Number of Registered Voters Report available in the *Custom Voter List* screen. You can choose from Number of Registered Voters, Number of Registered Voters by Gender, or Number of Registered Voters by Gender/Age. This report can be run by jurisdiction, school district, or for an entire county, along with many other sort options. The Number of Registered Voters reports will only count the records of voters who are eligible to vote on the date that the report is run. It will not count records that are in transition or records of voters who are not yet 18.

Action	Result
From *Reports* in the menu bar go to *Statistical and Informational* and click on *Custom Voter List*.	The *Custom Voter List* screen is displayed.
Click on the **[Selection Criteria]** button.	The *Custom Voter List Selection Criteria* screen is displayed.
Your *County* and *Jurisdiction* will already be chosen. If you want to run a Number of Voters Report for the entire jurisdiction click on the **[OK]** button.	Your voters are sorted and you are returned to the *Custom Voter List* screen. A number of voters will appear next to the **[Selection Criteria]** button.

If you want to run a Number of Registered Voters Report for a single precinct, click on the **Precincts** tab in the *Custom Voter List Selection Criteria* screen. Then place a check mark next to <u>Select Specific Items to Include</u> and highlight the precinct for which you want to run the report. Then click on the **[OK]** button.	Your voters are sorted and you are returned to the *Custom Voter List* screen. A number of voters will appear next to the **[Selection Criteria]** button.
Jurisdictions scripted to run school district precinct lists can run a Number of Registered Voters Report for an entire school district that extends beyond jurisdiction lines. In the *Custom Voter List Selection Criteria* screen remove the check mark from <u>Select Specific Items to Include</u> for Jurisdiction. (Do the same for County if the school district crosses the county line.)	The search will ignore jurisdiction lines.
Click on the **Districts** tab, enter a check mark in <u>Select Specific Items to Include</u>. In the <u>District Type</u> field, choose <u>School</u>, and highlight the school district for which you want the report.	The report will orient on school district lines.
Click on the **[OK]** button.	Your voters are sorted and you are returned to the *Custom Voter List* screen. A number of voters will appear next to the **[Selection Criteria]** button.
In the *Custom Voter List* screen, choose one of the <u>Number of Registered Voter</u> reports from the drop down list in the <u>Output Format</u> Field.	You can choose from <u>Number of Registered Voters</u>, <u>Number of Registered Voters by Gender</u>, or <u>Number of Registered Voters by Gender/Age.</u>
If more than one jurisdiction is present in your list of voters and you want the report to sort by jurisdiction, choose <u>Jurisdiction</u> from the <u>First</u> drop down list in the <u>Grouping</u> box.	The report will break the numbers down by jurisdiction.
If more than one precinct is present in your list of voters and you want the report to sort by precinct, choose <u>Ward/Precinct</u> from the drop down list in the <u>Sort</u> field.	

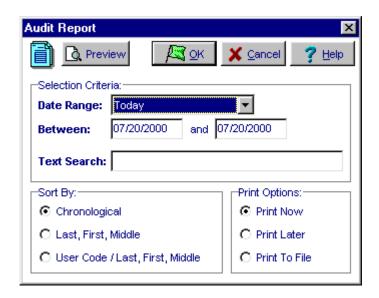|	
Report Title 1 and Report Title 2 allow you to enter a title and a sub-title for your report. Number of Registered Voters defaults into the Report Title 1 field. If you want to enter your own report title, delete Number of Registered Voters from the Report Title 1 field and enter your own title. If you want to include a sub-title, enter it in the Report Title 2 field.	The title and sub-title will print at the top of each page your the report.
Place a check mark in the Auto Print check box if you want a separate page to print at the end of your report which will list the selection criteria and the report options you chose for your report.	The Custom Voter List Settings report will print at the end of your list.
In Print Options, choose Print Now, Print Later or Print to File and click on the **[OK]** button.	Your report will either start printing immediately or will be sent to the *Local Report Queue* and you are returned to the *QVF Main Desktop*.
You can run a Number of Registered Voters Report for voters qualified to vote in a particular election. This will include people not yet 18, who will be in time for the election. In the *Custom Voter List Selection Criteria* screen, add to your selection criteria the Election from the **Elections** tab.	
Toward the bottom of the **Elections** tab are two check boxes for Voted AV and Voted (non AV); remove these check marks.	The system will run a report based on who will be eligible in a future election.
Click on the **[OK]** button.	Your voters are sorted and you are returned to the *Custom Voter List* screen. A number of voters will appear next to the **[Selection Criteria]** button.
Set up your Number of voters report as outlined above, and click on the **[OK]** button.	Your report will either start printing immediately or will be sent to the *Local Report Queue* and you are returned to the *QVF Main Desktop*.

Street Index

Printing Street Index Reports: A jurisdiction's street index can be printed for easy reference. The QVF software allows jurisdictions that are scripted to support school elections to print street indexes for entire school districts, which may extend beyond the boundaries of the jurisdiction. Street indexes can also be printed for other districts, such as county commission districts.

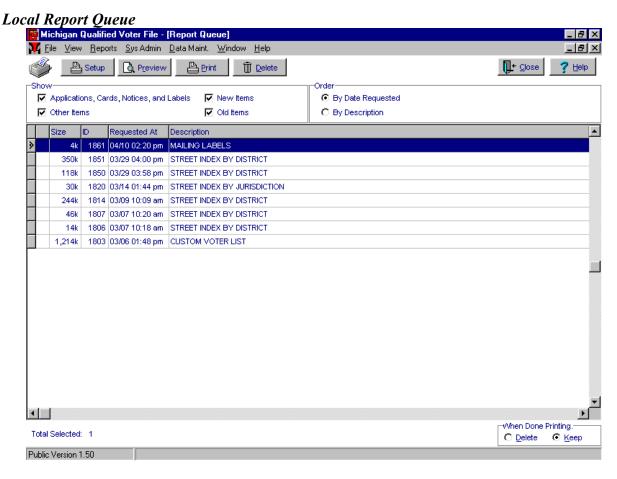| Action	Result
From the menu bar, under *Reports*, click on *Street Index*.	The *Print Street Index Report* screen appears.
Ensure that the County and Jurisdiction are correct.	The street index will run based on the criteria specified.
In the Street Index Print Options area choose Print Now, Print Later or Print to File. Click on the **[OK]** button.	The street index will print as specified.
If you want to print a street index for a school district that crosses jurisdictional boundaries, choose All in the Jurisdiction field.	The street index will run based on school district boundaries.
In the District Type field choose from the drop down list School. Then in the District Name field choose the school district you want to run the street index for.	
In the Street Index Print Options area choose Print Now, Print Later or Print to File. Click on the **[OK]** button.	The street index for a school district will print as specified.

If you want to print a list of just streets that have had some sort of change, enter a date in the <u>Changed Since</u> field.	
In the <u>Street Index Print Options</u> area choose <u>Print Now</u>, <u>Print Later</u> or <u>Print to File</u>. Click on the **[OK]** button.	An index will print of streets that have changed since the date you entered.
If you want to print a report for a particular street, enter that street name in the <u>Street Name</u> field.	Your report will be limited to just the street indicated.

The Audit Report

There is no longer a check box on the *Log On* screen for generating an Audit Report. Audit Report information is now saved automatically as work is performed. Audit Reports may be printed at any time for any time frame within the last six months.

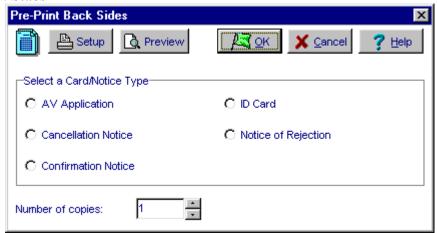| Action	Result
From *Reports* in the menu bar click on *Audit Report*.	The *Audit Report* screen is displayed.
From the drop down list choose a Date Range. Your options are Today, Yesterday, This Week, This Month, Last Week, Last Month or Custom.	The Audit Report will run for the time period indicated.
If you want to run your list for a single date or a span of dates, enter those dates in the Between and and fields	A custom Audit Report will run for the time period indicated.
The Text Search field allows you to run a report based on any information contained in the Audit Report data. You can search based on voter names, actions, operators or addresses among other items.	An Audit report will run for the time period specified, limited by the text search criteria. (All the changes made by a certain operator yesterday for instance.) You can not search by date in the Text Search field.
Sort By determines in what order the information will appear. Chronological will sort entries by date entered. Last, First Middle will sort alphabetically by the voters name. User Code/Last, First, Middle will sort by who entered the change, then alphabetically by the voter's name.	The information sort is established.
In the Print Options area choose Print Now, Print Later or Print to File. Click on the **[OK]** button.	The Audit Report will print as specified. You are then returned to the *QVF Main Desktop.*

Local Report Queue

The ***Local Report Queue*** is where all Print Later jobs are stored. ID cards and Master cards, as well as AV applications and AV ballot mailing labels, are stored as a single batch job even when requested separately. Each batch job will contain a single day's production. (If you produce AV ballot mailing labels on Monday and Tuesday, these are stored as two separate jobs in the ***Local Report Queue***.)

Action	Result
From ***Reports*** in the Menu bar click on ***Local Report Queue.***	The ***Local Report Queue*** screen appears. All print items appear in the grid.
The order in which items appear in the ***Local Report Queue*** screen is determined by the radio button in the Order box.	By Date Requested will arrange your print jobs by the date/time they were sent to the queue. The most recent date/time is at the top. By Description will arrange your print jobs alphabetically in descending order.

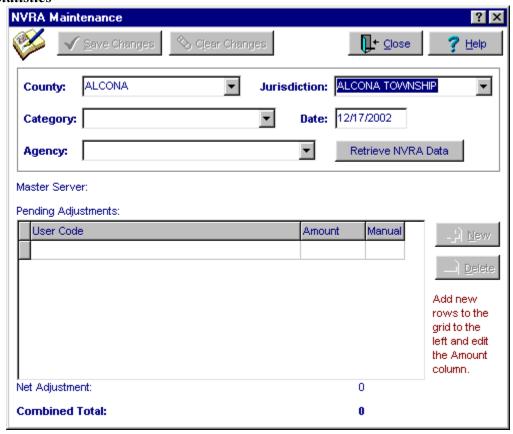|	
The Show box allows you to limit what you see in the queue to just those items with check marks. When all four items are checked you see everything that has been sent to *the Local Report Queue*.	The *Local Report Queue* displays only those items checked.
Click on the job you want to print.	That line is highlighted.
You can highlight multiple items by clicking on a line, then holding down the **Control** key on the keyboard and clicking on other items.	Specific print jobs are highlighted.
In the lower right hand corner of the screen, you can choose to delete or keep an item after it is printed in the When done printing area.	
	When using the Manual Feed Tray 1 to print ID card and Master cards, card stock should feed into the printer shorter side first. The side you want to print on must be facing up.
Click on the **[Print]** button.	A print screen is displayed.
Choose the page Range you want to print and the number of Copies. When printing labels, you are able to choose the Label Size, and Show Ballot Number. Once you have made all of your choices click on the **[OK]** button.	Your job starts printing
As the job is printed, if you chose to Keep...	A small printer icon will appear next to the print job.
As the job is printed if you chose to Delete..	The item will disappear from the list.
To manually delete items from the *Local Report Queue*, highlight the item(s) you want to delete and click on the **[Delete]** button.	A *Confirm* screen is displayed, "Delete Selected Item(s)?"
Click on the **[OK]** button.	The *Confirm* screen disappears and the indicated jobs are deleted.

Pre-Print Back Sides

The *Pre-Print Back Sides* feature allows you to print batches of the backs of various cards and notices which contain standard information, ahead of time. This is a time saving feature that eliminates the need to flip the stock over after printing the front to print the backs.

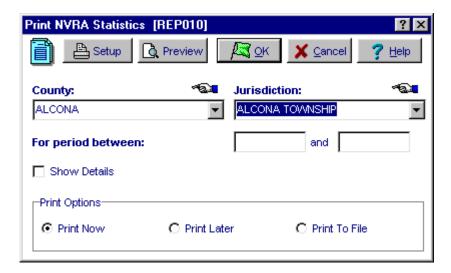| Action	Result
From *Reports* in the Menu bar click on *Pre-Print Back Sides*.	The *Pre-Print Back Sides* screen appears.
Place the radio button next to the type of notice or card for which you want to pre-print the backs.	Choose any one of AV Application, Cancellation Notice, Confirmation Notice, ID Card and Notice of Rejection.
In the Number of Copies field, enter or use the arrows to designate how many copies you want to run.	The printer will run the number of copies designated.
Load the proper blank stock in your printer, then click on the **[OK]** button.	The copies will start printing immediately.

NVRA Statistics

Starting with the 2002-2004 reporting cycle, you can use the QVF to track your NVRA reporting information. Most categories will be tallied automatically by the QVF application. Some adjustments may need to be made manually. For instance, you probably will not enter duplicate registrations into the QVF and then reject them as duplicates; but this is a category tracked by the NVRA report. Currently there is no automatic tabulation of Confirmation Notices Sent or Returned, so these categories will also have to be manually adjusted. You can manually adjust numbers for any NVRA tracking category in the QVF. To manually adjust your NVRA statistics use the following instructions.

Action	Result
Under *Data Maintenance* click on *Tweak NVRA.*	The *NVRA Maintenance* screen is displayed.
Ensure that the County and Jurisdiction are correct. Then, from the drop down lists, choose a Category and an Agency.	The data produced will be based on the category of transaction and the registration agency you chose.
The Date field will default to today's date, you may change the date to any you wish.	The date entered will appear as the transaction date of the items you enter.
Click on the **[Retrieve NVRA Data]** button.	A list of entries that match the Category and Agency will appear in the Pending Adjustments grid. If there are no matches the grid will remain blank.

Click on the **[New]** button.	Your user code will appear in the User Code column of the Pending Adjustments grid, a "Y" will also appear in the Manual column and the Amount column will be highlighted.
Enter the number of transactions in the highlighted Amount field.	
Hit **Tab**, or click on the **[New]** button again to enter more transactions of this type.	A second line is added to the Pending Adjustments grid. The **[Save Changes]** and **[Clear Changes]** buttons become enabled.
After you have finished with the entries of this type, click on the **[Save Changes]** button.	Your changes are saved and applied to the NVRA data stored in your computer.
Click on the **[Close]** button.	You are returned to the QVF Main Desktop.

If you maintain your NVRA tracking information in the QVF, you will be able to use the NVRA report from the QVF to provide information to the state. NVRA Statistics can be run for any time period you desire. If you want to run a report containing NVRA statistics for you own jurisdiction do the following.

Action	Result
Under *Reports* click on *NVRA Statistics*.	The *Print NVRA Statistics* screen is displayed
Designate a time period you want the report for by entering "from" and "to" dates in the For period between field.	The report produced will give you totals by the various NVRA categories for the time period between the dates specified.
If you want a report that lists dates of all transactions put a check mark in the Show Details box.	A complete report of all transaction between the dates specified will be produced.
Choose your Print Options from Print Now, Print Later or Print to File.	Your report will either print immediately or be sent to the *Local Report Queue* and you are returned to the QVF Main Desktop.